A REALVOLVE HOW-TO | By Mark Stepp

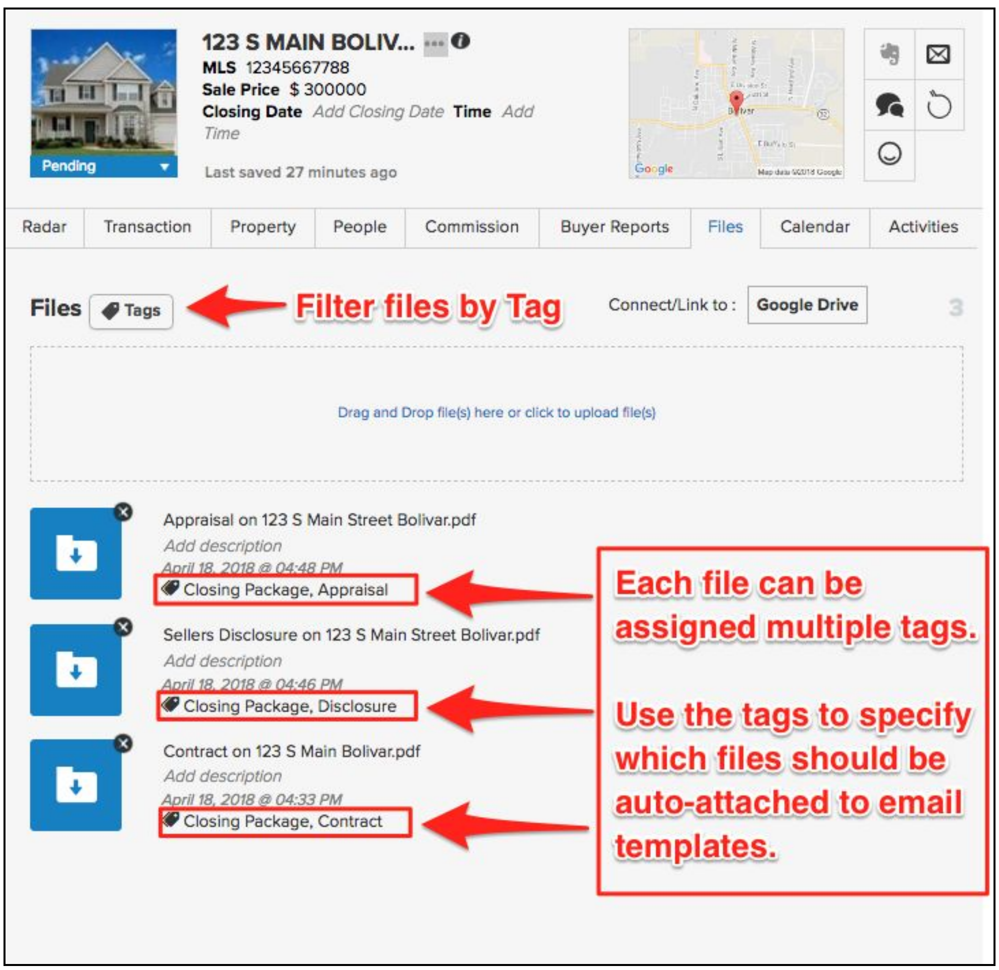
Tagged File Attachments

Training

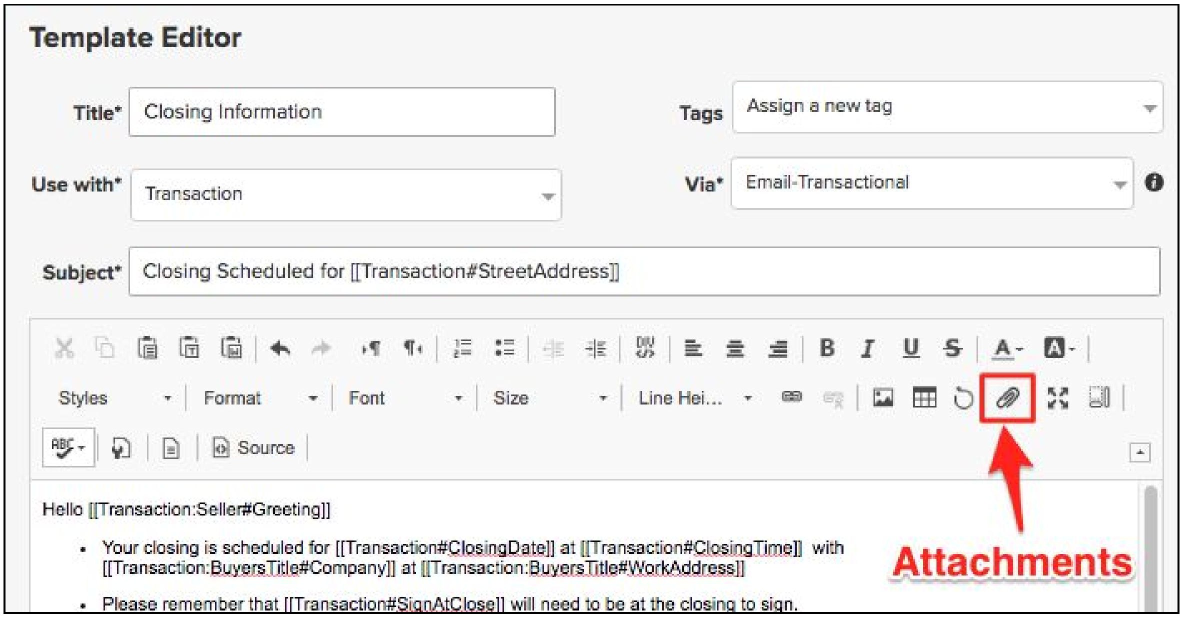
One challenge with sending automated emails in a workflow is when record specific attachments need to be included.   In the past, you had to use the “Send Manually with Preview” option to manually attach any documents that needed to be included.   Now you can use the “Choose Tag” option in the template attachments screen to select which Tagged files should be auto-attached.

How this works:

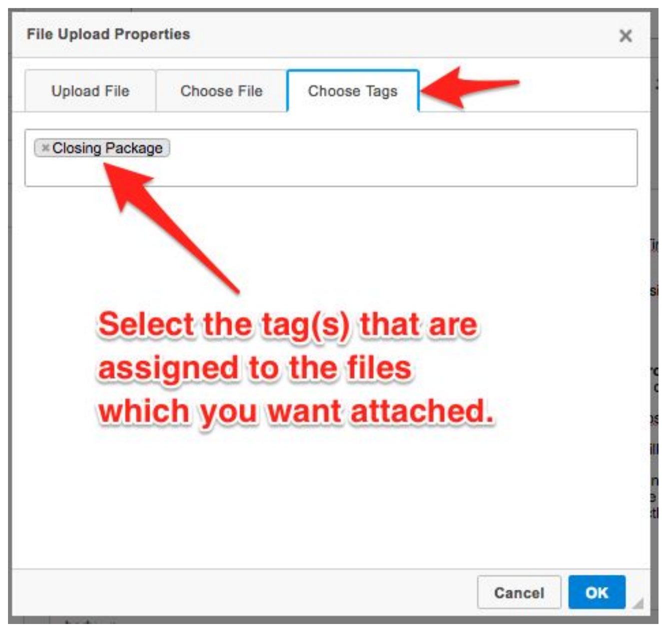
Each of the documents listed in the **‘Files’** tab of a Contact, Property or Transaction can be tagged with any number of tags which to classify them. Individual tags can be assigned to multiple files to group documents that are related in some way. The 3 documents below have individual tags for **Appraisal**, **Disclosure** and **Contract** as well as the tag of **Closing Package** to group them together.



To attach all documents from the files tab that is tagged with '**Closing Package**' you simply click on the **'Attachments'** icon in the toolbar of a template.

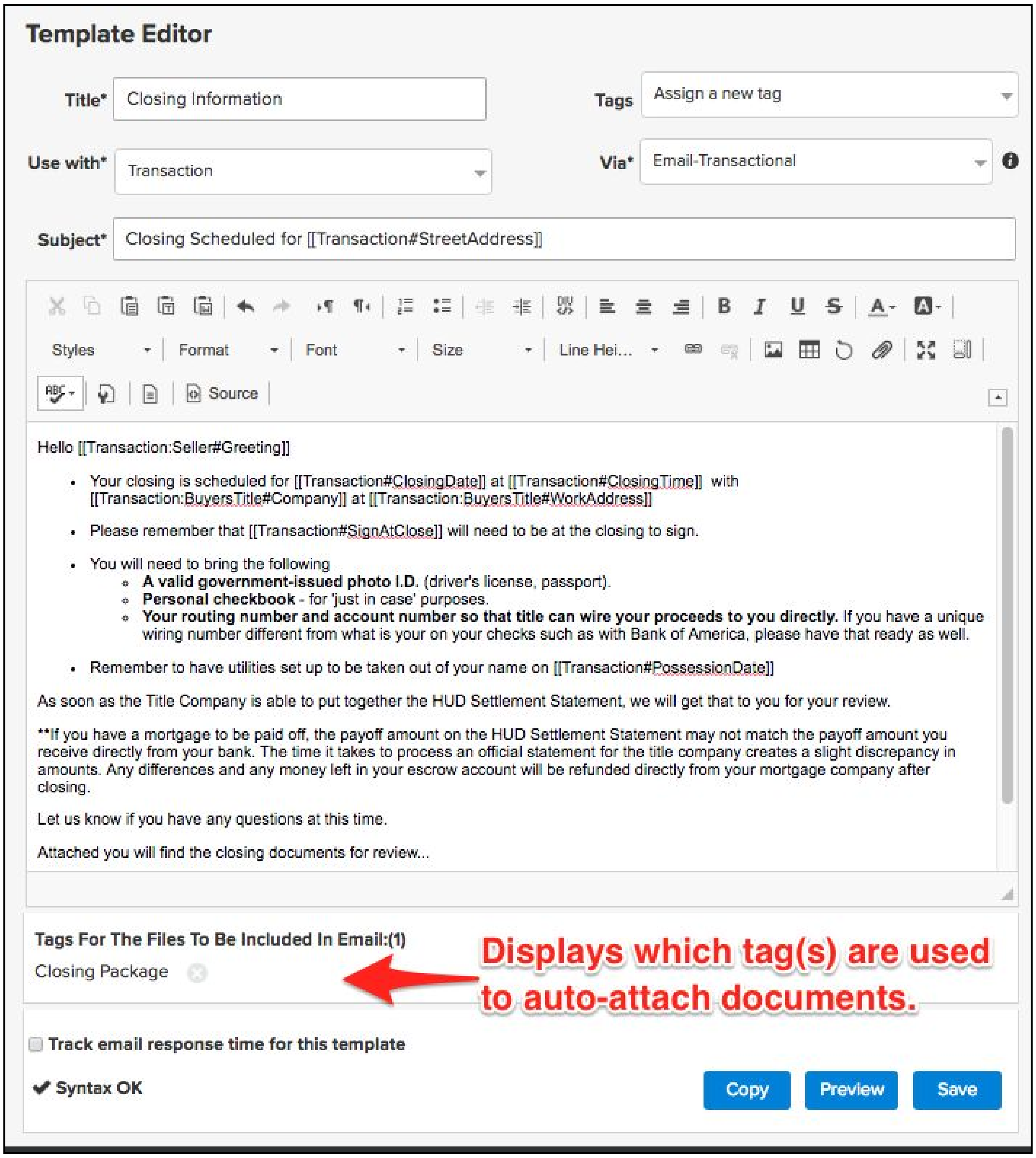


Select the '**Choose Tags**' tab and select the tag(s) that you want auto-attached then press the [**OK**] button. In this case we want all documents in the files tab that are tagged with '**Closing Package**'. ***Note***: You can select multiple tags to attach different types of documents if needed.



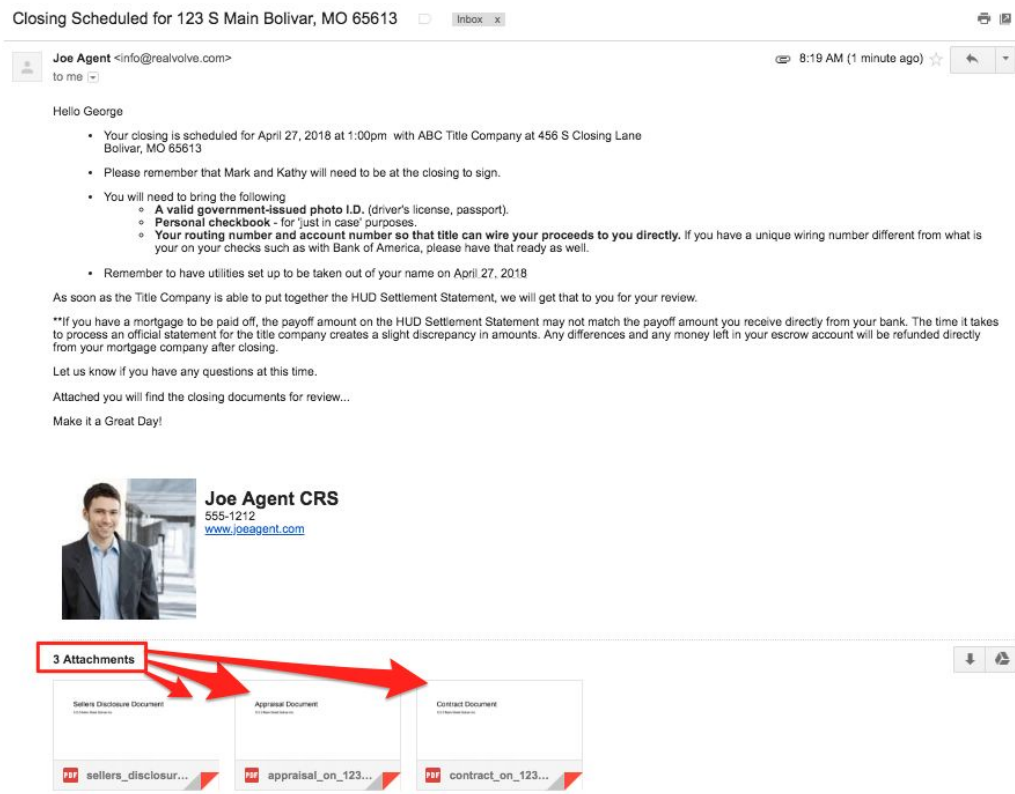
Special Note: If your attachment screen does not have the '**Choose Tags**' tab you will need to convert it to an enhanced template using the convert icon located next to the template name in the template list. (see: converting to enhanced templates)

The selected list of tags used to auto-attach documents to the template will be displayed at the bottom of the Template Editor screen.



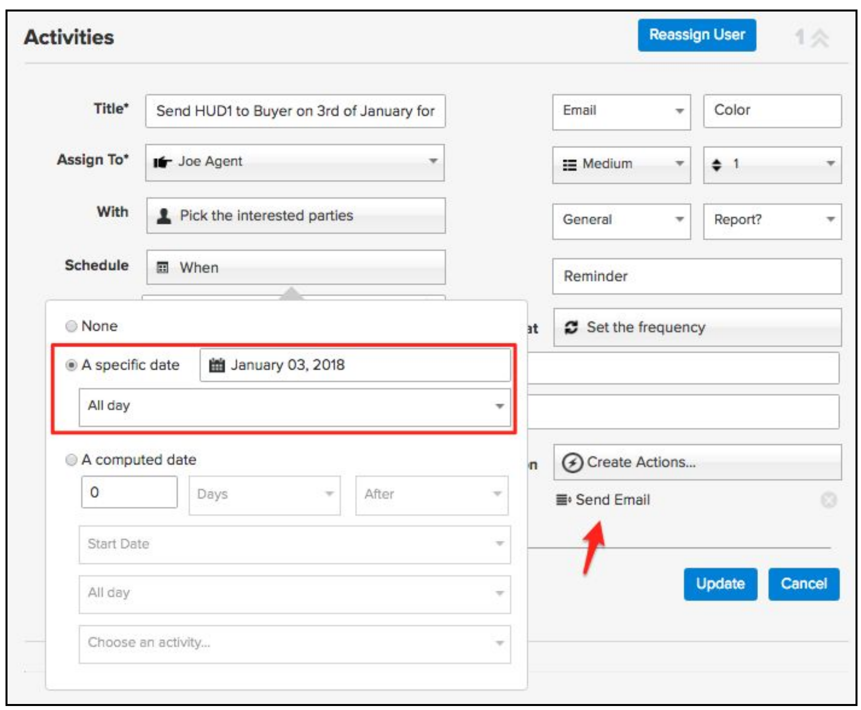
When the template is used from a workflow or individually from a contact, property or transaction screen the system will check the files tab of the record to locate all documents with the selected tag and automatically attach them to the email before sending. This means that you no longer need to use the “Send Manually with Preview” just to manually attach files, Realvolve can do it automatically for you.

In this case it attached all 3 documents that were tagged as '**Closing Package**'.



NOTE: This is a GREAT way to automatically send the HUD1's to everyone that had a transaction with you the previous year.

Add a workflow activity to send the template on January 3rd (the year is ignored) and make sure the document in the files tab of the transaction is tagged as 'HUD1' and use that tag in the template as shown above.



Questions?

Please direct questions and comments to support@realvolve.com